

# BUDGET DOCUMENT CHECKLIST

## Instructions:

- Use this checklist to see if your budget document is complete.
- Use one checklist per budget document.
- Inventory and check the items listed below that must be contained in your budget document.
- Check the appropriate distribution for each of the copies of your budget document; use Column A if levying a tax, use Column B if not levying a tax. Don't use both columns.
- Attach a checklist to the front of each budget document.

|                                           |                       |                                       |                                               |
|-------------------------------------------|-----------------------|---------------------------------------|-----------------------------------------------|
| Name of District <u>City of Elgin</u>     |                       |                                       |                                               |
| Mailing Address <u>P.O. Box 128</u>       |                       |                                       | <input type="checkbox"/> Check if new address |
| City <u>Elgin, OR</u>                     | State <u>OR</u>       | ZIP Code <u>97827</u>                 | County <u>Union</u>                           |
| Name of Contact Person <u>Joe Garlitz</u> | Title <u>Recorder</u> | Daytime Telephone No. <u>437-2253</u> |                                               |

## Inventory of Items in Budget Document:

- ☒ The newspaper page or photocopy containing the Notice of the First Budget Committee Meeting showing the name of the paper and the publication date; or an affidavit of publication accompanying a copy of a newspaper clipping.
- ☒ The newspaper page(s) or photocopy containing the Notice of Hearing and the Financial Summary showing the name of the paper and the date published; or an affidavit of publication accompanying a copy of a newspaper clipping; or an affidavit of mailing or posting and copies of LB-1, LB-2, LB-3, and LB-4, or ED-1, ED-2, and ED-3.
- ☒ The newspaper page or photocopy containing the Second Notice of Budget Hearing showing the date published; or an affidavit of publication accompanying a copy of a newspaper clipping.
- ☐ Voter approved ballot measures for new tax bases and new levies outside the tax base.
- ☒ All the budget detail sheets.
- ☒ The four resolution statements that adopt the budget, make appropriations, levy taxes, and categorize the levy.
- ☒ Form LB-50 or ED-50 (copy both front and back).
- ☒ M-5 Certification form.

**Distribution of Budget Document:** If your district is **levying a tax** use Column A for the distribution of your budget document. If your district is **not levying a tax** use Column B for the distribution of your budget document.

### Column A

(Includes urban renewal agencies using tax increment financing)  
If your district is levying a tax on LB-50 or ED-50, send:

- ☒ 2 copies to county assessor of primary county.
- ☒ 1 extra unbound copy of both the LB-50 or ED-50 (front and back) and the M-5 form to county assessor.
- ☐ 1 copy to county assessor of joint counties if district is levying a tax in more than one county.
- ☒ 1 copy to county clerk.
- ☐ 1 copy to county treasurer if treasurer makes bond payments.
- ☐ 1 copy to Tax Supervising and Conservation Commission if district is in Multnomah County.
- ☐ 1 copy to Education Service District if a school district.
- ☐ 1 copy to Department of Education if a school district.

### Column B

If your district is not levying a tax, send:

- ☐ 1 copy to Department of Revenue\*.
- \*Send to: Property Tax Division  
Oregon Department of Revenue  
955 Center Street NE  
Salem OR 97310-2501
- ☐ 2 unbound copies of the M-5 form to county assessor(s) if applicable.
- ☐ 1 copy to county clerk.
- ☐ 1 copy to Tax Supervising and Conservation Commission if district is in Multnomah County.
- ☐ 1 copy to Education Service District if a school district.
- ☐ 1 copy to Department of Education if a school district.